

PREPARING YOUR COMPUTER TO USE TEMPLATES

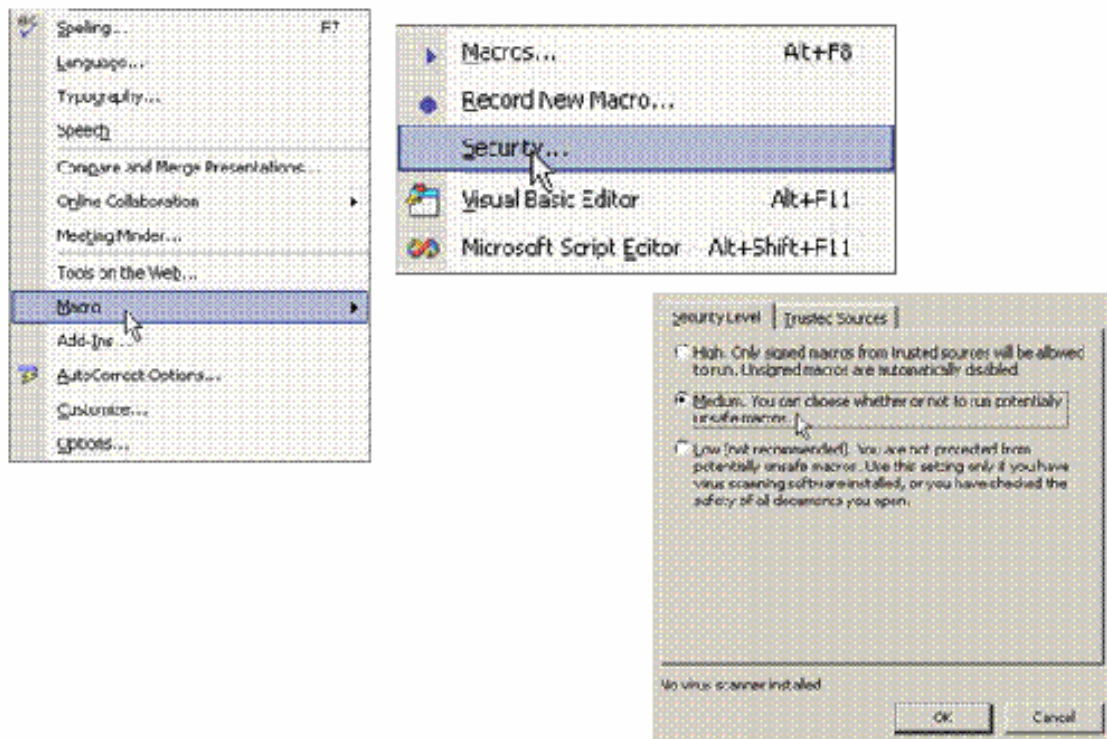
Security Settings

Forms contain macros to provide automation of some tasks. Security is set within applications and may be set to **high** on your workstation. That setting does not allow macros to download. It is necessary to change the setting to Medium **prior to using or downloading forms the first time only**. The setting will remain at medium when Word is closed and reopened.

For Office 2000 or Higher

Open Word

Click **Tools + Macro + Security + (select Medium) + OK**



Repeat these steps for **Excel, and PowerPoint**.

For Older Office Versions

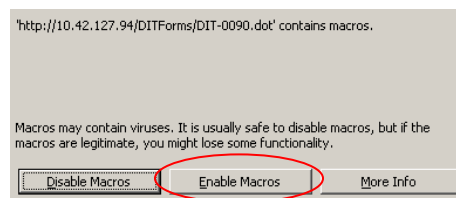
Open Word (Excel and PowerPoint)

Click **Tools + Options + General** and remove the **check mark** from **Macro Virus Protection**.

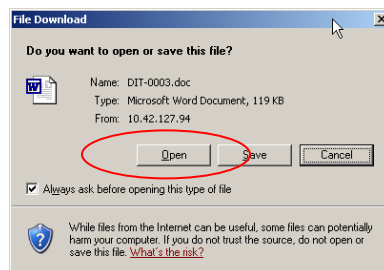
NOTE: You will be prompted to **Enable / Disable Macros** when opening or downloading. **Always click ENABLE.**

How to Download DIT Forms & Templates

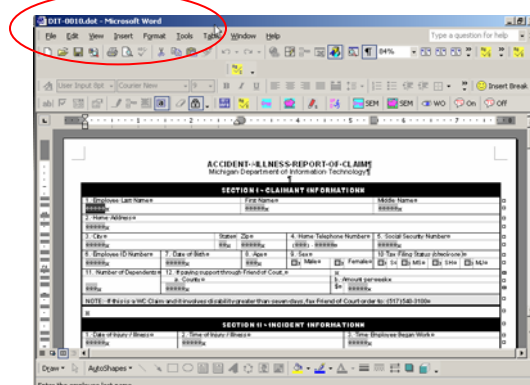
1. Open TechTalk and **Click** on the **Quick Links** selection **DIT Forms Index**
2. **Scroll** or **CTRL + F + keyword or number** to locate the form you wish to use.
3. Position your cursor over the **title** and **click once**. A warning dialog box may appear indicating, "The document you are opening contains macros...". All of the form templates contain macros/customizations from a trusted source. Therefore, **click the Enable Macros** button to proceed..



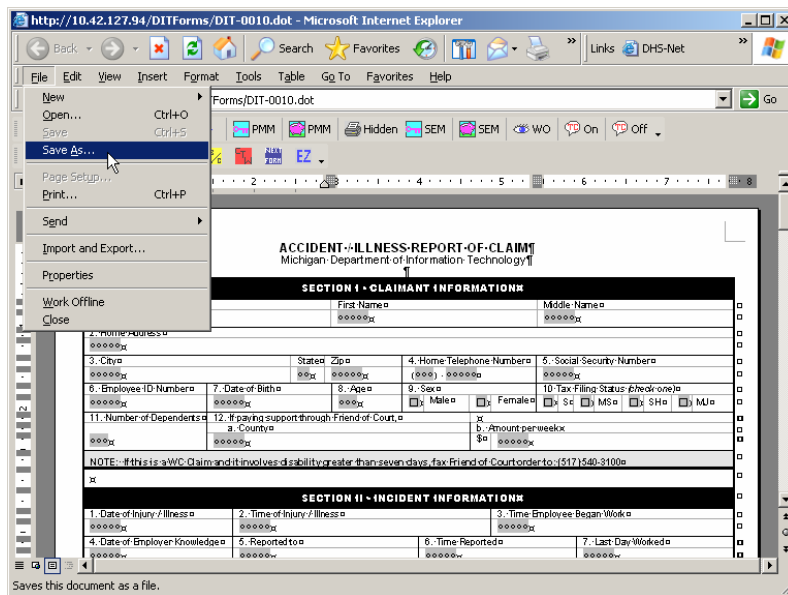
Note: Another pop-up box **may** appear asking if you wish to Open or Save the file. **Always click OPEN**. The template will open in the web browser window. You may or may not need to close a yellow pop-up **by clicking OK** prior to saving the template on your hard drive.



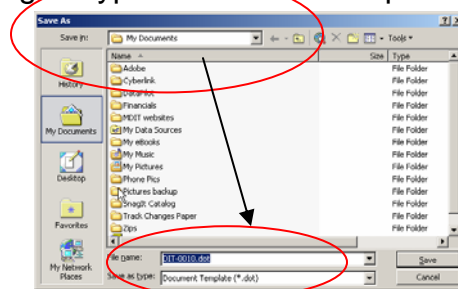
4. It will appear as though Word has been opened and the form will be displayed on the screen. **NOTE:** You should see the title of the form **.dot** and **MUST save it as a template (.dot)**.



Save the form to your hard drive by clicking **File + SaveAs**.



5. Note the location where you are saving the form and that it is Saving as type: Document Template (*.dot) and click **Save**.



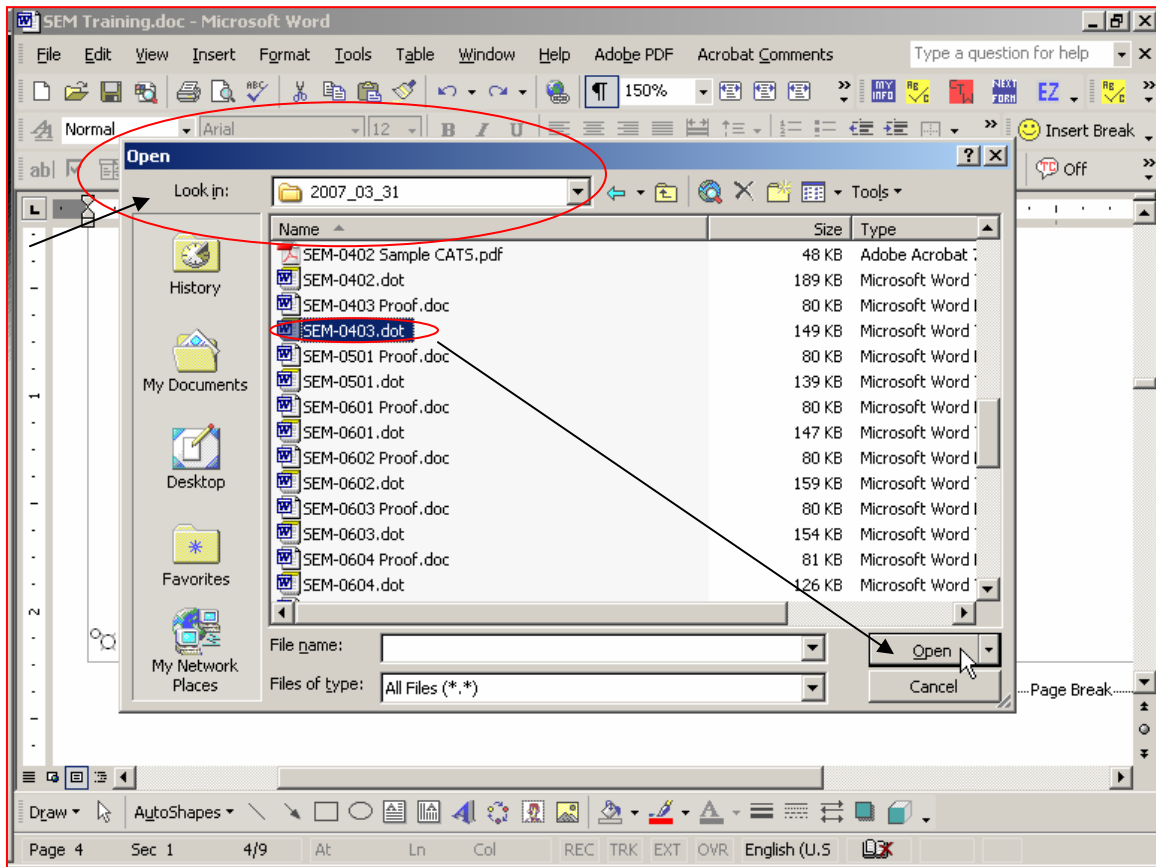
NOTE: You may give the form another name before saving (such as the title) during this step that will make it easy for you to find. **DO NOT** change the type. You must save it as a Document Template.

Repeat steps 1-5 above until all of the forms you normally use have been downloaded to your workstation.

Access the template for use by:

- ✓ **Open** Microsoft Word
- ✓ Click **File + Open +** locate the form on your hard drive and select it + **Open**.

You must always work with the .dot or the template functionality will be lost.

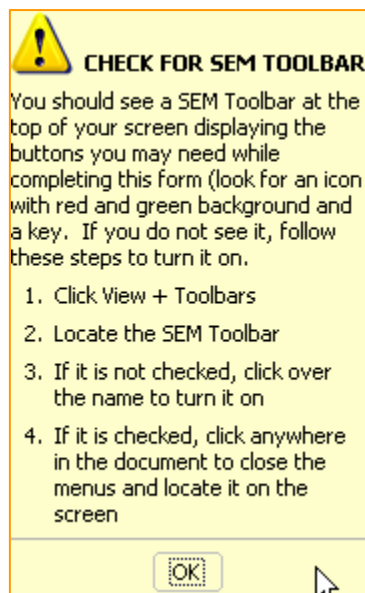


USING THE SYSTEMS ENGINEERING METHODOLOGY (SEM) TOOLBARS

What is a Toolbar

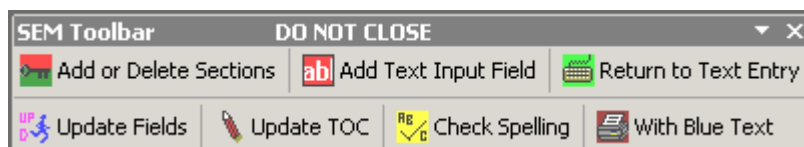
A Toolbar is a collection of buttons which, when clicked, cause a macro to run and perform a function which enables you to do something that would take many more keystrokes without the macro. The SEM templates use 7 macros that should appear at the top of the template.

When you open a SEM template, you will first see a pop-up explaining that you should see the SEM Toolbar and how to locate/open it if you do not have it after you close the pop-up.






You may close the pop-up by **pressing the Esc key or clicking OK**. If you need to refer back to it, tab out of the first field and then click back into it. Once the pop-up is closed you should see the following:

The Standard SEM Toolbar



Toolbar Functions





Each button provides a single click access to a function which would normally require many.

Button	Function
 Add or Delete Sections	Unlocks the template to enable you to add/delete/change standard wording. NOTE: You will not have the benefit of the macros as long as the form is unlocked and great care should be used not to make changes that are not desired.
 Add Text Input Field	Enables you to put a text input field in to be used for entering data. The 3 available fields are on the Forms Toolbar , which is turned on by clicking View + Toolbar + Forms .
 Return to Text Entry	Relocks the template to enable tabbing between form fields for text entry. Locking the template also enables the toolbar buttons to again work.

NOTE: The **Add or Delete Sections** and **Return to Text Entry** buttons are essentially toggle switches which must be clicked in the correct order. If you press the Return to Text Entry before pressing the Add or Delete Sections button or click either more than once without having clicked the other, you will see an error message.

Click **End** and click the opposite button first.



 Update All Fields	Updates any fields in the document with the most recent information. You must do this after entering the project name in each template.
 Update TOC	Updates the Table of Contents with the pertinent information from the document. Use this button after adding/deleting pages to a template.
 Check Spelling	Runs Spell Check on only the user input information . Click the icon and you will be asked if you wish to begin spell check now. Click Yes to begin. NOTE: Only the user input areas of the form will be checked as the standard wording has already been proofed prior to issuing the template.
 With Blue Text	Prints the template with ALL of the text, both visible and hidden (blue instructions).


FILLING IN FORM FIELDS

Always Open the template as a template (.dot) when completing/editing it. This is done by:

- ✓ Open Word and click **File + Open +** locate the **filename.dot + Open**
- Or
- ✓ Open My Computer + locate the **filename.dot + right mouse click + Open**


Instructions




Instructions for what is desired throughout the template will appear in **blue** type. This information will appear on the screen automatically when you open the document. When you print the document, you will no longer see the instructions, only the standard wording and user input.

If you desire to have a printed copy with the instructions included, click on the  button on the SEM Toolbar.

User Input Fields

There are several types of fields used in the templates. They are:

Field Type	Description
Text box	<p>Text boxes may appear as a grey box on some screens, or as small 'o's on others. You can move between text boxes by pressing TAB or clicking with the mouse. Tabbing ensure that you will not miss fields. The text box may be restricted to allow only a set amount of characters.</p> <p>There may already be text appearing in the box which will be highlighted when you tab into the field. This is either default text, or may be an explanation of what is wanted in the field.</p> <p>Help messages for each field will also be found at the bottom of your screen just above the  button row.</p>
Check box	<p>Check boxes appear as <input type="checkbox"/> and enable an X to appear by clicking on the box or pressing the space bar after it is highlighted.</p>

Field Type	Description
	<p>Help messages for each field will also be found at the bottom of your screen just above the  button row.</p>
Drop-down Box	<p>A drop-down box appears as  in the template. You may view the selections within the box by clicking on the arrow to the right of the box, or by pressing F4 key + down arrow to highlight the desired selection. That selection will then appear in the box.</p> <p>Help messages for each field will also be found at the bottom of your screen just above the  button row.</p>
"Click HERE and Type"	<p>You must use the mouse to click into this field. Position the cursor over the HERE and click. The entire phrase should be highlighted if you have clicked in the proper location.</p> <p>This type of field enables you to use all of the formatting for bold, underline, numbering, etc., options that are available within Word. It also makes it possible to copy material from another document and paste it into this area. The size of the area will expand as long as you continue adding material. There is not a restriction on the number of characters you may enter.</p>
"Click and Tab"	<p>This is used to indicate that the table area you are asked to input text into is not protected for text and will enable you to move from column to column using the tab key. You have the ability as in the "Click HERE and Type" field to use any formatting you desire. Additional rows may be added to the table by tabbing from the last column of the last row. You may see the message "Tab to add rows" in that cell.</p>

If you have questions not answered here, please contact:

Sandy Cain, DIT Forms Officer

(517) 636-6514

cains@michigan.gov